



TAX- DEFERRED INVESTING

**Wealth-Building and
Wealth-Transfer Strategies**



Cory C. Grant and Andrew D. Westhem

A MARKETPLACE BOOK

Tax Deferred Investing Wealth Building And Wealth Transfer Strategies

Russell J. Fishkind, Robert C. Kautz



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J.K. Lasser Pro Real Estate Investment Trusts Richard Imperiale, 2002-06-17 Benefit from the outstanding investment opportunities that currently exist in the REIT industry The growth of REITs as an asset class has created an excellent opportunity for small investors to participate in the ownership of institutional quality real estate Are you ready to help your clients make the most of this opportunity J K Lasser Pro Real Estate Investment Trusts thoroughly explains the nature of REITs and explores how this investment vehicle can be integrated and implemented into almost any client's portfolio This invaluable resource discusses the benefits and performance characteristics of REITs and includes a chapter on each of the following forms of REITs available including Residential REITs Manufactured home community REITs Office REITs Industrial property REITs Retail REITs Hotel property REITs Health care REITs Self storage REITs Specialized diversified and mortgage REITs Filled with practical guidance vital information and in depth interviews with some of the most respected individuals in the REIT industry J K Lasser Pro Real Estate Investment

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The New Trader's Tax Solution Ted Tesser, 2012-10-23 The Thoroughly Updated Guide to Reducing Tax Liability for the Trader and Serious Investor. What would you do to increase your trading profits by as much as 50%? Most traders and investors would do whatever it takes. Those same traders will much too often what the profits earned with their blood, sweat, and tears shrink considerably as they prepare their tax returns. You have in your hands the easy-to-use tools that will protect your hard-earned assets. Packed with proven strategies that reduce your tax exposure, this comprehensive guide is completely updated with information and strategies for the most recent tax changes. Here are invaluable business, estate, retirement, planning, and tax-saving strategies that virtually anyone can implement within the new tax laws. It is simple to use and includes specific information to help traders reduce their tax liability with individual case studies, real-world examples, and model tax returns. CPA and expert tax consultant Ted Tesser provides current solutions for the tax problems facing most U.S. traders, investors, and income earners today: excessive tax payments to federal and local governments, insufficient preparation for retirement, and ultimately the fate of bequests. In this book, Tesser shows everyone concerned: How to disinherit the federal government; How Trader Status is upheld even under audit; How to augment underfunded retirement plans; How to master the basics of estate tax planning; How to integrate the triple crown; Tesser's latest strategy for tax avoidance and wealth accumulation into your trading plan; and much more. Keep the profits you work so hard to earn, whether from trading, investing, or hard work, and take control of your financial destiny. The NEW Trader's Tax Solution has put years of experience at your fingertips. With the triple crown, you will learn how to unleash the full power of Trader Status by combining it with a Trading Entity. You will also learn how to establish a Welfare Benefit Trust to accomplish all these goals and more. This program enables you to take advantage of little-known facets of the tax law that have been on the books for almost three quarters of a century. You'll learn how to contribute and deduct substantial amounts of money over any period of time. Grow the principle in a fully tax-deferred, 100% secure environment. Access the money at a future date not limited by age, income, or retirement plan status. Avoid the restrictions of ordinary retirement plans by using the same techniques that have been used by America's largest corporations since 1928. Whether you are looking for last-minute tax-saving tips or trading techniques that position you for the optimal tax reduction, The NEW Trader's Tax Solution is a must-have addition to any trading library. Get the government to pick up the tab on this year's trading profits; foot the bill for any trading losses; and increase your wealth by 50% instantly. After putting Trader Status on the map, Tesser now takes it to another dimension, complete with real

world case studies illustrations templates and filled out ready to be filed tax forms **Keeping Clients for Life** Karen Caplan Altfest, 2001-07-02 A successful financial planner is someone who does more than just crunch numbers and present an annual investment plan to clients There is a psychological component to effective client care as well as to issues involving clients overall financial well being People skills as well as financial planning skills are necessary to build a successful financial planning business This comprehensive guide teaches both new and veteran financial professionals how to relate to their clients in meaningful ways thus growing their business by increasing the long term retention of those clients Offered here are insights into such issues as how to determine which clients to accept how to propose a plan clients can use how to tread carefully in family situations how to develop sensitivity and communications skills and how to work with the media and recognize the importance of building your business one lasting relationship at a time Karen Caplan Altfest PhD CFP New York NY is Vice President of L J Altfest Co a financial planning and investment management firm She is also the Director of the Financial Planning and Investments Program at the New School *J.K. Lasser ProEstate and Business Succession Planning* Russell J. Fishkind, Robert C. Kautz, 2002-01-04 EFFECTIVE ESTATE AND BUSINESS SUCCESSION PLANNING UNDER THE NEW TAX LAW A properly designed and implemented estate and or business succession plan is key to providing for and protecting loved ones in the most tax efficient manner possible A team of advisors must be assembled from the disciplines of law insurance finance accounting and tax in order to create a plan that optimizes planning opportunities incorporating both the current state of law with the current state of one s mind J K Lasser Pro Estate and Business Succession Planning Second Edition provides you with a unique and comprehensive analysis of the Economic Growth and Tax Relief Reconciliation Act of 2001 the new retirement distribution rules Section 529 education plans and split dollar insurance guidelines It can help professionals and experienced individuals alike take advantage of opportunities presented by the new tax law avoid common mistakes and understand complex estate and business succession planning techniques Written by two attorneys who specialize in estate planning matters this easy to read book provides you with complete information and strategies for a variety of issues including How to plan in light of the phased in provisions of the Economic Growth and Tax Relief Reconciliation Act of 2001 Top twenty factors to consider when creating one s Will as well as creating a Power of Attorney and Health Care Proxy Annual Exclusion and Exemption Equivalent Planning Irrevocable Life Insurance Trusts and Crummey Notices Charitable Remainder Trusts and Foundations Family Limited Partnerships Business Succession Planning Techniques Split Dollar Plans Section 529 education plans Retirement distribution rules Self Canceling Installment Notes Intentionally Defective Grantor Trusts GRITs GRATs and GRUTs And this is just a sampling of the expertise that the authors provide in a truly unique and understandable text J K Lasser Pro Estate and Business Succession Planning Second Edition contains all you need to make the most of the new tax law while navigating this complex area and shows you how to protect and provide for loved ones for generations to come Please visit our Web site at www.jklasser.com *Fee-Only Financial*

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Expert Financial Planning Robert C. Arffa, 2001-03-09 Praise for J K Lasser Pro Expert Financial Planning A gem of a personal financial planning guide Dr Arffa has prepared many of the chapters himself and his highly readable and accessible overviews are presented with grace and clarity Included also are discussions by industry professionals and leading investment thinkers Readers seeking to enhance their financial security will be richly rewarded Burton Malkiel author of A Random Walk Down Wall Street Here is top level financial planning advice for professionals who counsel affluent clients as well as for savvy individual investors looking to make the most of their incomes for years to come Featuring the expertise of some of our most articulate nationally recognized finance pros this priceless book will take you through all the steps necessary to creating and realizing a financial plan that s right for your personal needs and goals Learn how to Set and prioritize goals Assess your current financial status Make projections for each goal Devise a strategy that includes spending saving and investing Review risk management Track your financial progress Evaluate the tax consequences of investment decisions Select life and disability insurance all with the help of leaders in their fields including John C Bogle Richard Driehaus Peter Katt Weston Wellington Gregory D Curtis Jay Mueller CFA and many more Smart Investing Strategies for Long-term Financial Growth: How to Build Wealth Without Taking Unnecessary Risks Silas Mary, 2025-02-11 Building wealth isn t about luck it s about strategy patience and making smart financial decisions This book unveils the proven investment principles used by successful investors to grow their wealth consistently over time You ll learn how to create a well balanced investment portfolio avoid common pitfalls and build financial security without taking unnecessary risks From stocks and bonds to real estate and alternative assets this guide breaks down complex financial

concepts into simple actionable steps Whether you re a beginner or an experienced investor this book will show you how to maximize your returns while protecting your assets You ll gain insight into market trends risk management and the power of compound growth Stop gambling with your financial future learn how to invest wisely and secure long term prosperity with a strategy that works in any economic climate

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Simple Wealth: Insider Strategies and Techniques for the Clients of Our High Net Worth Wealth Management Firm Daniel Beech,2024-12-15 How many financial advisors do you know that have built a 350M business from the ground up in their career I ll wager none or not many Today your answer is one more Entrepreneurship is in our DNA We understand the needs of business owners and your challenges and we have high impact solutions that can help In our book Simple Wealth Insider Strategies and Techniques for the Clients of Our High Net Worth Wealth Management Firm we introduce you to some of these solutions There are many more this is but a primer We ve innovated We ve disrupted the traditional Wealth Manager model so you can now accomplish with one firm what previously took four or five different professionals to accomplish

Wealthbuilding Kurt Rosentreter,2009-07-15 Rosentreter a senior financial advisor and insurance agent at a major financial services firm in Toronto presents a personal finance guide tailored to Canadians

The Role of Taxes in Wealth Building: Legal Ways to Reduce Taxes Ikechukwu Kelvin Maduemezia,2025-08-19 Taxes may feel like a burden but managed wisely they can become a powerful wealth building tool The Role of Taxes in Wealth Building shows how entrepreneurs professionals and investors can legally reduce tax liabilities and keep more of their hard earned money Covering deductions credits business structures and retirement accounts this book simplifies tax planning for non experts You ll discover strategies the wealthy use like real estate tax benefits capital gains planning and small business write offs to grow wealth faster More importantly you ll learn how to stay compliant while taking advantage of every opportunity the law provides With easy to understand explanations and real life examples this book makes taxes less intimidating and more empowering If you want to stop overpaying and start maximizing this is your practical guide to using the tax system to your advantage

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Build Business Equity While You Sleep: Sell Value, Not Your Personal Time Simon Schroth, 2025-04-23. True business success comes when you build something that generates income even when you're not working. Build Business Equity While You Sleep teaches you how to create a business that builds value and generates passive income so you can focus on growing wealth rather than constantly trading time for money. This book shows you how to transition from a time-for-money business model to one that leverages assets, intellectual property, and recurring revenue. You'll learn how to create scalable offers, build a strong brand, and develop systems that keep the business running smoothly even when you're not actively involved. The book also explores how to sell your business in the future to reap the rewards of the equity you've built. If you want to create a business that generates long-term value and works for you while you sleep, Build Business Equity While You Sleep provides the strategies to build wealth and exit successfully. **J.K. Lasser Pro New Strategies for College Funding** Raymond D. Loewe, KC. Dempster, 2002. A PROFESSIONAL GUIDE TO PLANNING FOR

COLLEGE FUNDING A properly designed college savings plan is key to providing a college education as well as the best way to avoid any surprises Yet many parents fail to realize how much time money and commitment are needed to accomplish this goal As an advisor you must guide your clients through this process with poise and confidence and J K Lasser Pro New Strategies for College Funding An Advisor s Guide with its companion CD ROM will help you do just that Filled with expert advice real world case studies and invaluable tools techniques worksheets and checklists this comprehensive guide will allow you to connect with your clients and plan for their children s college education in the best way possible Organized into three complementary sections J K Lasser Pro New Strategies for College Funding will help you Quantify the college problem for your clients and communicate effectively and motivationally to each of them by using tools such as The College Savings Calculator TM The Financial Aid Test TM and The College Funding Integrator TM as well as spreadsheets that allow you to calculate exactly what clients need to save on a monthly basis Choose the tools you need to implement the plan Coverdell Education Savings Account formerly the Education IRA Qualified Tuition Savings Prepaid Tuition Plans Savings Bonds and much more while balancing income tax strategies financial aid strategies and control of money issues Put the plan together and build in appropriate exit strategies to give your plan the flexibility it needs And this is just a sampling of the expertise this book provides Pick up J K Lasser Pro New Strategies for College Funding and find out how to create and implement a successful college savings plan that is right for each of your clients personal needs and goals Please visit our Web site at www.jklasser.com

Passive Income Secrets No One Shares: How to Make Money While You Sleep Ahmed Musa, 2025-03-13 Imagine making money without constantly trading your time for it Passive Income Secrets No One Shares shows you how to create streams of passive income that generate wealth while you sleep This book reveals the strategies used by the wealthy to build automated income streams from real estate investments and dividend stocks to creating digital products and online businesses You ll learn how to set up systems that work for you allowing you to earn money without being directly involved in day to day operations If you re looking to break free from the grind and build a life of financial freedom this book will show you how to create passive income that works for you around the clock

The Master Key to Life: Unlocking Your Full Potential Through Financial Freedom Patrick Owens, What if financial freedom wasn t just for the lucky few but something you could achieve no matter where you re starting from The Master Key to Life Unlocking Your Full Potential Through Financial Freedom isn t just another money book It s a blueprint for transforming your financial reality breaking free from the paycheck to paycheck cycle and building lasting wealth on your terms In this book you ll uncover The Wealth Mindset How the world s most successful people think about money and why their mindset matters more than their income Building Multiple Income Streams Proven strategies to create financial security beyond your 9 to 5 The Power of Smart Investments How to make your money work for you even while you sleep Debt Spending Saving Secrets How to escape financial traps and grow your wealth the right way Lessons from the Greats Real stories of historical figures entrepreneurs

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